AXITHORN

Zoho Premium Partner

Case Study · Will writing and estate planning

Simon Hall Will Writing Services Case Study

How Simon Hall Will Writing Services keeps its personal touch with every client using Zoho One

An Exeter Will-writing firm built its reputation on personal service. Axithorn set up Zoho CRM to prompt the team at the right moments, such as reviews, anniversaries and birthdays, so no client is forgotten and the personal contact stays with the people.

INDUSTRY	LOCATION	ZOHO PLATFORM
Legal services: Will Writing and estate planning	Exeter, Devon, UK	Zoho One

OVERVIEW

From chasing reviews by hand to a CRM that reminds the team to stay in touch

Simon Hall Will Writing Services helps families across Devon and the South West put Wills, Lasting Powers of Attorney and estate plans in place, with appointments at home or online. Its reputation rests on personal service. Having moved off a white-label CRM onto Zoho, its reminders were not working as the team needed: review requests went to the office instead of the client, and staff were sending them by hand.

Axithorn became the firm's ongoing Zoho partner in early 2025 and set up **Zoho CRM** to remind the team at the moments that matter to clients. The firm still decides who it contacts and how. Zoho makes sure nobody is missed.

Zoho products used

- Zoho One
- Zoho CRM
- Zoho Campaigns
- Zoho Analytics
- Zoho WorkDrive

Key takeaways

01
Personal service stays personal
Reminders and templates handle the routine, so Will Writers keep their time for conversations with clients.

02
Reviews asked for at the right moment
When a deal is marked as Won, the client is invited to share feedback, addressed by first name, with a gentle follow-up after three weeks if there is no reply.

03
Care for couples
Will anniversary reminders cover both partners, with care for bereavement or separation, and every client is remembered on their birthday.

04
Ongoing partnership
Axithorn provides monthly support and new ideas as the firm grows.

4
Zoho apps in daily use: CRM, Campaigns, Analytics and WorkDrive

3 weeks
until a gentle follow-up is sent if a client has not replied to a review request

2
partners in a couple, both remembered in the Will anniversary reminder

EXECUTIVE SUMMARY

Families across the South West, looked after for the long term

Simon Hall Will Writing Services helps families across Devon and the South West put Wills, Lasting Powers of Attorney and estate plans in place, with appointments at home or online. The firm's reputation is built on personal service, and the team of Will Writers has grown since the move to Zoho, with new Will Writers joining through 2025.

The firm had used Genie, a white-label CRM, before moving to Zoho. In December 2024, through an introduction, it met Axithorn, and in January 2025 it tagged Axithorn as its Zoho partner to make Zoho support the way the team works. The CRM now prompts the team at the right moments, so the personal contact stays with the people.

Company profile

Company	**Will Writing & Estate Planning Services (Exeter) Limited**
Sector	**Will writing and estate planning**
Founded	**2019**
Location	**Exeter, Devon, UK**

> I have found James to have vast experience within a CRM environment and can provide impartial advice.

Simon Hall
Founder, Simon Hall Will Writing Services

PROBLEM STATEMENT & KEY CHALLENGES

Reminders weren't reaching clients, so the team did the chasing by hand

Having moved from a white-label CRM to Zoho, the firm's reminders were not doing what the team needed. Review requests were going to the office inbox rather than to clients, so staff were sending them manually.

The firm's reputation rests on personal service, so any tool had to support that, not replace it. As the firm grew, each new Will Writer also needed templates, signatures and the right dropdowns, and the team wanted to see which referral sources bring in clients.

What was in place before

- Genie, a white-label CRM
- Review and feedback requests sent by hand from the office

1 **Manual follow-up**

Review requests were sent to the office inbox, so the team was sending them by hand.

2 **Remembering couples with care**

Anniversary contact had to reach both people in a couple, with care for bereavement or separation.

3 **Keeping service consistent as the team grows**

Each new Will Writer needed templates, signatures and the right dropdowns, so every client gets the same quality of contact.

4 **Knowing where work comes from**

The firm wanted to see which referral sources bring in clients.

EVALUATION OF THE PROBLEM

Getting more out of a Zoho system the firm already had

The firm had already moved from Genie to Zoho One and wanted a specialist to get the most out of it. It was introduced to Axithorn in December 2024 and tagged Axithorn as its Zoho partner in January 2025.

Zoho already held the firm's client records, so the question was not whether to change platform but who could make it work properly. Axithorn offered impartial, hands-on CRM advice and a clear list of fixes, starting with the review requests.

STEP 1

Introduction

Introduced to Axithorn through a contact in December 2024.

STEP 2

Partner tag

Axithorn tagged as the firm's Zoho partner in January 2025.

STEP 3

Fix list

A list of fixes agreed with the office manager, starting with the review requests.

PROPOSED SOLUTION

Reminders and templates that protect the personal touch

Axithorn focused on the reminders that help the team stay close to clients and keep referrals coming in, all built on the firm's existing Zoho One subscription. The firm still decides who it contacts and how. Zoho makes sure nobody is missed.

Why Zoho was the right fit

- CRM, email, reporting and document storage under one Zoho One subscription
- Reminders that make sure no client is forgotten, while the contact itself stays personal
- A partner who works with the team as it grows

Zoho CRM

A review request when a deal is Won, addressed by first name, with a gentle follow-up after three weeks. Will anniversary reminders covering both partners, and birthday cards from date of birth. Lead statuses aligned to deal stages, plus templates and signatures for each Will Writer.

SOLVES

Manual follow-up, remembering couples with care and keeping service consistent as the team grows.

Zoho Campaigns

Regular email updates to clients and contacts, and web forms that feed enquiries into the CRM.

SOLVES

Staying in touch with clients and contacts.

Zoho Analytics

Referral source reporting, showing which sources bring in clients.

SOLVES

Knowing where work comes from.

Zoho WorkDrive

Shared storage for the templates and documents the Will Writers use.

SOLVES

A growing team working from the same templates.

IMPLEMENTATION

An ongoing partnership rather than a one-off project

Axithorn started with a fix list agreed with the office manager, then rebuilt the review, anniversary and birthday reminders so they fit how the team talks to its clients. It has stayed on as the firm's Zoho partner, with face-to-face reviews with the team and, in 2026, wider Axithorn team support for ongoing CRM updates.

DELIVERY

Ongoing since January 2025

Axithorn tagged as Zoho partner in January 2025 and has supported the firm month by month since.

JAN 2025

Introduction and fix list

- Introduction and partner tag
- Fix list agreed with the office manager

SPRING TO SUMMER 2025

Reminders rebuilt

- Review request, anniversary and birthday reminders rebuilt
- Sales funnel, lead statuses, templates and calendar appointments refined
- Face-to-face reviews with the team

AUTUMN 2025

Growing the team

- New Will Writers onboarded
- Referral source reporting
- Email campaigns and web forms

2026

Ongoing support

- Wider Axithorn team support for ongoing CRM updates
- Options explored for linking Zoho with WillSuite and for AI-assisted enquiries

Hurdles along the way

THE HURDLE

Review requests were going to the office inbox instead of the client.

HOW WE HANDLED IT

Axithorn rebuilt the trigger so the request goes to the client, with their first name, when a deal is marked as Won, with a follow-up after three weeks if there is no reply.

THE HURDLE

Anniversary contact needed to reach both people in a couple, with care for bereavement or separation.

HOW WE HANDLED IT

The reminder covers both partners and can be held back where a record needs special care, so the team decides how to reach out.

Additional services delivered

Monthly support · Templates and signatures for new Will Writers · Face-to-face reviews with the team · Referral source reporting

> Simon Hall's reputation is built on looking after people personally. We set Zoho up to remind the team at the right moments, so they spend their time with families rather than chasing admin.
>
> **James Welch-Thornton**
> Managing Director, Axithorn

RESULTS

More time for clients, and no client forgotten

Zoho CRM now prompts the team at the moments that matter to clients, and new Will Writers are set up with the same templates and access as the rest of the team. The routine is handled, and the personal contact stays with the people.

4
Zoho apps in daily use

3 weeks
gentle follow-up when a review request is not answered

Less chasing by hand

Feedback requests go to clients when a deal is marked as Won, with a gentle follow-up if there is no reply.

Lasting relationships

Anniversary and birthday reminders mean no client is forgotten, and the team keeps the personal touch.

Fast onboarding

New Will Writers get templates and access with the rest of the team, so service stays consistent.

Referral visibility

Referral source reporting shows where new clients come from.

Looking ahead

- Linking Zoho with the firm's Will-drafting software, WillSuite
- AI-assisted enquiries

> Axithorn are excellent at responding to issues and challenges, and they translate the technical side into terms that I and the team can understand.

Simon Hall
Founder, Simon Hall Will Writing Services

AXITHORN

Axithorn is a UK-based Zoho Premium Partner. Every implementation is designed and delivered by senior consultants, not resold off the shelf: Zoho One rollouts, CRM and sales, finance and ERP, analytics and AI, integrations and custom development, migration and ongoing managed support.

Zoho Premium Partner

YOUR ZOHO PARTNER

Ready to run your business on one platform, implemented properly?

Book a free consultation

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